



12th Annual

**Digital Marketing** for  
**Financial Services**  
**Summit** **NEW YORK**

# PAST ATTENDEE LIST

The largest and longest-running digital marketing for financial services event series in the United States

November 6-7, 2025

## Sample Past Attendee List

COMPANY	JOB TITLE
Academy Mortgage Corporation	Digital Strategy Vice President, Business
Aetna Inc.	Vice President, Marketing Product Management
Affinity Federal Credit Union	AVP, Digital Experience
Alantra	Vice President, Business Development & Marketing
AllianceBernstein	Vice President, US Retail Marketing
Ally Financial Services	Director, Email Marketing & Domain Management
American Century Investments, Inc.	Chief Marketing Officer
American Express Company	Director, Performance Marketing Analytics
American International Group (AIG)	SVP & CTO, Enterprise Platforms
Ameriprise Financial, Inc.	Senior Manager, Paid Media
Ameritas	Senior VP & Chief Marketing Officer
Amica Mutual Insurance Company	Senior Assistant Vice President, Marketing
AmTrust Financial	Chief Marketing Officer
Aon	Chief Marketing Officer, North America
Apple Bank for Savings	Chief Marketing Officer
Arch Insurance Group	Regional Head of Marketing
Atradius US	AVP, Head of Marketing & Operations
AXA Investment Managers	Head of Marketing & Communications, Americas
Axos Bank	VP, Brand & Content
Baldwin Risk Partners	Senior Director, Enterprise Digital Marketing
Banco Santander	Senior Director
Bank of America	Global Head of Product & Client Commercialization

## Sample Past Attendee List

COMPANY	JOB TITLE
Bayview Asset Management	Head of Marketing, Consumer Lending Fintech
Bessemer Trust Company	Principal, Senior Marketing Manager
Biz2Credit Inc.	VP, Growth Strategy
BlackRock	Chief Marketing Officer, Americas
Blackstone Group	Global Head of Marketing
Bloomberg LP	Global Head of Digital Strategy & Content Marketing
BMO Harris Bank	VP, Senior Digital Product Owner
BNP Paribas	IT Director
BNY Mellon	VP, Digital Marketing Technology Development & Integrations
BNY Mellon Asset Management Canada Ltd.	Vice President, Enterprise Social Media
BOK Financial	SVP, Marketing
Brown Brothers Harriman & Co.	Head of Marketing
Cambridge Associates LLC	Associate Director, Digital Marketing
Canada Life	Director, Marketing
Canadian Western Bank	Creative Director & AVP, Creative Services
Capital One Financial	Head of Experience Insights
Cerity Partners	Chief Marketing Officer
Charles Schwab	Director, Financial Planning & Investor Engagement (Digital)
Chase	Vice President, Marketing Strategy Lead
Chicago Stock Exchange, Inc.	Director, Marketing Operations
CI Financial	Chief Digital Officer
CIBC	Senior Director, Marketing

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COMPANY	JOB TITLE
Citadel LLC	Director, Marketing & Communications
Citibank	SVP, Advertising & Branding
Citigroup	Chief Marketing & Content Officer
Citizens Financial Group	SVP, Head of Marketing, Digital & CX Analytics
City National Bank	Vice President, Marketing
Clear Street	Chief Marketing Officer
CNO Financial Group	Director, Ecommerce
Columbia Threadneedle Investments, US	Marketing Director, Paid Media
Combined Insurance	Chief Executive Officer
Comerica Bank	Vice President, Digital Marketing
Commonwealth Equity Services, LLC	Chief Marketing Officer
Commonwealth Financial Network	Chief Marketing Officer
Crawford & Company	Vice President, North America Marketing
Credit Karma, Inc.	Head of Growth Marketing
Customers Bank	SVP, Digital Marketing
DailyPay Inc.	VP, Brand Strategy
Delta Community Credit Union	Vice President, Digital Strategy
Depository Trust & Clearing Corporation (DTCC)	Executive Director, Global Account Management
Digital Federal Credit Union (DCU)	Marketing Director
Discover Financial Services	Vice President & Head of Marketing & Product Management
Dow Jones	Senior Vice President, Brand Marketing
E*TRADE (from Morgan Stanley)	Vice President



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COMPANY	JOB TITLE
East West Bancorp, Inc.	Director, Consumer Strategy
Edward Jones	Director, Marketing
Empower	Senior Director, Retirement Product Marketing
Epoch Investment Partners	Managing Director, Marketing
Equifax	VP, Tech & Media Platforms
Equitable Bank	Senior VP, Sales & Marketing
Equitable Holdings, Inc.	Marketing Director
Ernst & Young	Lead, Digital Products & GTM
EZCorp	Head of Growth Marketing
FactSet	Director, Digital Client Experience
Federated Hermes, Inc.	Senior Manager, Content Strategy
Fidelity Investments	B2B Digital Marketing Lead
Fidelity Life	Director, Marketing & Business Development
First Bank	VP, Marketing
First Command Financial Services	Vice President, Strategic Marketing
First Midwest Bancorp	Senior VP & Director, Digital Marketing Strategy & Programming
First National Bank	Director, Digital & Direct Marketing
Fiserv	Senior Vice President, Enterprise Marketing
Fitch Ratings Inc.	Senior Director, CRM Operations
Flagstar Bank	Director, Digital & Banking as a Service Program Management
Franklin Templeton Investments	Institutional Marketing Head (US)
Freddie Mac	Director, Marketing & Communications

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COMPANY	JOB TITLE
Goldman Sachs	Managing Director, Global Head of Content & Product Marketing
Great-West Lifeco	Director, Strategy & Innovation
GreenPath Financial Wellness	Chief Marketing Officer
Guardian Life Insurance	Chief Marketing Officer
HAB Bank	Senior Executive Vice President
Hamilton Lane Inc.	Vice President, Head of Marketing Infrastructure & Technology
HomeStreet Bank	Senior Vice President, Retail Banking Senior Operations Manager
Horizons Exchange Traded Funds	Executive Vice President, Head of Marketing
Houlihan Lokey	Chief Marketing Officer
HSBC Bank Canada	Senior VP, Advertising & Marketing, Strategic Sourcing
Hudson Valley Credit Union	Senior Vice President & Senior Director, Marketing
Huntington National Bank	Assistant VP, Digital Marketing Optimization Lead
iCapital Network	SVP, Head of Digital Marketing
IGM Financial Inc.	Director, Marketing Operations
Institutional Shareholder Services (ISS)	VP, Marketing
Intercontinental Exchange (ICE)	Chief Marketing Officer
J.P. Morgan & Co.	Vice President, Marketing Operations, Next Gen Technology
J.P. Morgan Asset Management	VP, Marketing
Janus Henderson Investors	Global Chief Marketing Officer
Jefferies LLC	Head of Marketing & Communications
JMMB Group	Group Chief Marketing Officer
JPMorgan Chase & Co.	Vice President, Digital Strategy & Content

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COMPANY	JOB TITLE
KeyBank	VP, Consumer Bank Strategy
Kotak Mahindra Group	Senior Vice President, Digital Banking
KPMG International Cooperative	Director, Communications
Lazard Inc.	Vice President, Global Communications & Marketing
LendingTree	Media Director, Brand
Liberty Mutual	Director, Product Marketing & Advanced Analytics
Lincoln Financial Group	VP, Marketing & Sales Technology Strategy
London Stock Exchange Group	Global Head, Business Marketing
Lord, Abbett & Co.	Head of Digital Experience
LPL Financial LLC	Chief Marketing & Communications Officer
M&T Bank	SVP, Senior Digital Engagement Manager
Marsh	SVP, Strategic Data Delivery, Derivation & Insight
MassMutual	Director, Marketing & Customer Experience Group (Client Acquisition)
Mastercard	Senior Vice President, Marketing Services
Maybank	SVP & Head of Pricing & Data Analytics
Meridian Credit Union	Chief Marketing Officer & Senior VP, Retail Banking
MetLife	Chief Marketing Officer
MIDFLORIDA Credit Union	Senior VP, Marketing
MissionSquare Retirement	Chief Marketing Officer
Morgan Stanley	Managing Director, Global Head of Digital & Direct
Morgan Stanley Wealth Management	Executive Director, Digital Marketing
Morningstar, Inc.	Global Head of Marketing

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COMPANY	JOB TITLE
Mountain America Credit Union	Senior VP, E-Marketing
Movement Mortgage	Regional Director, Marketing
MSCI	Vice President, Digital Optimization & Performance
Mutual of America	Vice President, Digital Marketing & Social Media Strategy
Nasdaq	Head of Data Marketing
Nationwide Mutual Insurance Company	Director, Social Media
Neo Financial	Head of Communications
Neuberger Berman LLC	Chief Marketing Officer
New York Life Insurance Company	Director, Content Strategy, Planning & Management
Ninety One Limited	Marketing Director, North America
NJM Insurance Group	Digital Marketing Strategy Leader
Northern Trust	Chief Marketing Officer
Northwestern Mutual	Chief Marketing Officer
Oaktree Capital Management	Assistant Vice President, Corporate Communications
Old National Bank	SVP & Director, Digital Marketing Strategy
PayPal	Head of Consumer Marketing
PenFed Credit Union	Chief Marketing Officer
Penn Mutual	AVP, Product Marketing
Pershing	Global Head of Marketing
PGIM Inc.	Chief Marketing Officer
PIMCO	SVP, Global Digital Marketing Strategy
PineBridge Investments	Vice President, Marketing, Digital & Web



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COMPANY	JOB TITLE
Plante Moran	Director, Marketing
Primerica	SVP, Social Media & Public Relations
Prudential Financial	VP, Digital Marketing
Pzena Investment Management	Director, Marketing Operations
RBC	Vice President, Intermediary Marketing
Regions Financial	Senior VP & Digital Marketing Strategist
Rockefeller Capital Management	Senior Vice President & Director, Marketing
S&P Global	Chief Marketing Officer, S&P Global Market Intelligence
Schroders	Head of Digital, Americas
Scotiabank	Vice President, Enterprise Digital Marketing
Seacoast Bank	Senior VP, Digital Marketing
SEI Investments	Director, Marketing & Communications
Selective Insurance Group	Head of Digital Marketing
Square	Head of Global GTM Data
State Street Global Advisors	VP, Digital Marketing
Sun Life Financial	Director, International Life Marketing
Swiss Re	Vice President & Senior Economist
Synchrony Financial	SVP, Chief Marketing Officer
T. Rowe Price	VP, Senior User Experience Design Manager
TCW Group	Global Head of Marketing
TD Bank Group	SVP, Head of Marketing Transformation, Analytics, MarTech, Targeted Marketing & Personalization
TD Wealth - Private Giving Foundation	Head of Product Growth & Analytics   Digital Platforms

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COMPANY	JOB TITLE
Teachers Insurance and Annuity Association of America (TIAA)	Global Head of Digital Marketing & Media
Tompkins Financial	Assistant VP & Marketing Officer
Travelers	VP, Consumer Marketing
Truist	Assistant Vice President, Direct & Digital Marketing
UBS Canada	Director, Digital Marketing
UMB Bank	Executive VP, Interactive Marketing
United Nations Federal Credit Union	Chief Marketing Officer
Unum	Director, Digital Strategy & Transformation, GenAI & Emerging Technologies
US Bank	Executive Vice President, Chief AI & Analytics Officer
Van Eck Associates Corporation	Director, Digital Marketing Operations
Vanguard	Martech Lead
Veterans United Home Loans	Vice President, Marketing
Visa	Martech Lead
Webster Bank	Senior Managing Director, Enterprise Products & Digital Banking
Wells Fargo	SVP, Marketing Director
Woodruff Sawyer	VP, Marketing
World Financial Group	Senior Director, Marketing
WTW	Head of Editorial

## SECURE YOUR SPOT NOW

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We have a limited number of speaking opportunities and they sell out quickly! Connect with our community of **intent-based buyers** ready to invest in your solution.



**Book a call** to learn how this opportunity can help you generate new leads and increase your pipeline!



**Darren Haughian**  
Sponsorship Director

Call: 1-866-298-9343 x 276  
[darren@strategyinstitute.com](mailto:darren@strategyinstitute.com)

## Upcoming Events in this Market Segment

15th Annual  
**Digital Marketing** for  
**Financial Services**  
Summit **CANADA**

Spring 2025

7th Annual  
**Digital Marketing** for  
**Financial Services**  
Summit **MIDWEST**

Fall 2025

11th Annual  
**Digital Marketing** for  
**Financial Services**  
Summit **WEST**

Fall 2026